



Women at the wheel in Turkey

Recruitment, retention, and advancement of women in the automotive industry

Preface



Numerous studies conducted both on local and global scale confirm that the existence of women in professional life has positive effects not only on value chain but also on revenue generation. Women's participation to professional life will continue to be important in the future as it is today.

Hoping that this research, conducted with the support of OSD (Automotive Manufacturers Association) and its member firms operating in Turkish automotive manufacturing industry, will be beneficial both for our country and the industry likewise. This comprehensive study, that contains data accumulated from 1,143 women with white collar, aims to provide a snapshot of the current state of women in the Turkish automotive industry while including comparative analyses based on similar data collected by previous Deloitte research in Europe and North America. In the report we endeavored to elucidate women's expectations from the industry as well as the measures to make it more attractive for women from their own perspective.

In the Turkish automotive manufacturing industry the percentage of white collar women has reached to an

important 25%. 57% of women participated in this research state that they are happy to be a part of the automotive industry in Turkey.

According to the study 95% of women in the industry have university education or above. It is important for the industry representatives to attract more high skilled women for quality manufacturing. Another important finding of the study is that women think that there are not enough women leaders in the automotive world. While 85% of women state that industry is lacking women leaders, 78% of participants highlight that the number of women occupying C level positions within their own company is not enough.

Giving women more chance at C-level and establishing a gender balanced corporate structure will be crucial in terms of developing creativity and boosting economic performance not just for the companies within the automotive industry which is perceived as highly male-dominant, but also for companies in other industries.

Özkan Yıldırım

Consumer and Industrial Products Industry Leader and
Automotive Sector Leader

About the women in Turkish automotive industry

Demographic Information

"Women at the Wheel in Turkey" research is a comprehensive survey conducted by Deloitte Turkey and Automotive Industry Association (OSD), with the participation of **1.143** white collar women working in the Turkish automotive manufacturing industry.

This survey aims to define the current place and role of the women in the Turkish Automotive Industry, and to compare the results with those of the European and American surveys to which 200 and 330 women participated respectively.

They hold a variety of positions



55%

The vast majority (55%) of the women participating in the survey is at the expert level; only 18% of the participants is at the executive level.

What do you do?



53%

of the women work in Product Development, Human Resources, Marketing&Sales, Supply Chain and Production channels.

%54 of the women who participated in the survey have less than 10 years of work experience. In Europe and North America participants are experienced executive level women; whereas in the case of Turkey the voice of young women working in the automotive industry is heard better.

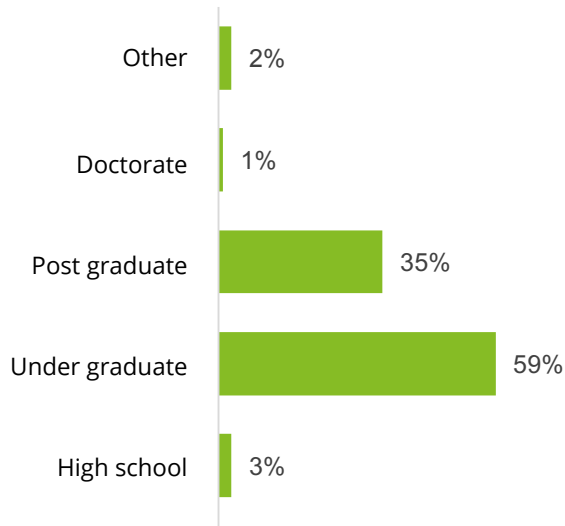


White collar women of the automotive industry are well educated

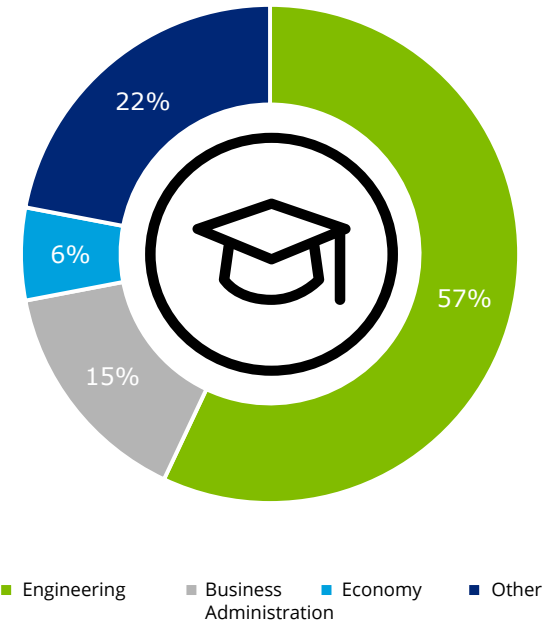
Educational background

95%

In parallel with the global findings, 95% of white-collar women have education at the university and higher level in the automotive industry in Turkey.



What did you study?



Predominantly, women with a background in engineering are preferred in the automotive industry in Turkey. Economy and business administration majors follow engineering. Women in Europe and North America have more different educational backgrounds in the automotive industry in comparison with Turkey.

Importance of increasing women employment

Women employment is an important issue for the future of automotive industry. Increasing women employment in general and specifically in the automotive industry is a must. Boosting women's participation in labor force has great importance in terms of tackling the talent «crisis issue» not just for Turkey but also for North America and Europe as well. Increased participation will later contribute to a socio-economically developed Turkey, the betterment in the societal status of women and a well developed and strong automotive industry.

The employment rate of women in Turkey is currently 29.3%. 14% of working women are employed by the manufacturing industry and this accounts for the 23% of the whole workers in the industry. On the other hand, the rate of white collar women in the Turkish automotive industry is 25%.

¹ TUIK, Employment Statistics, July 2017

² OSD Analysis

25%

The rate of White-collar women in the Turkish automotive industry.





Many studies indicate that there is a correlation between leadership diversity and profitability; and so organizations with diverse leadership are more profitable. Fortune 500 companies having higher rates of women managers yield 24% more income.



Women have a positive impact on decision making processes, corporate management and financial performance.

A gender balanced management team is perceived by 40% of women as variant perspectives in decision making, 36% of women as a balanced corporate management and lastly, 24% of women as an increase in commercial gains and financial performance.

40%

Variant perspectives in decision making

36%

Balanced corporate management



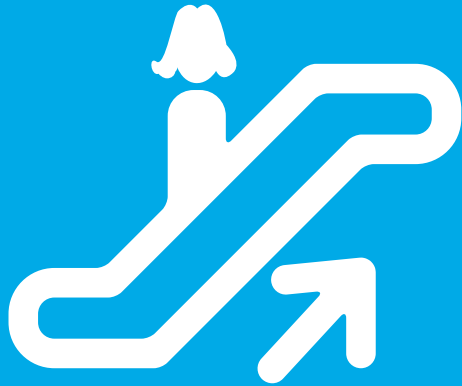
A gender balanced management team



24%

Increase in commercial gains and financial performance

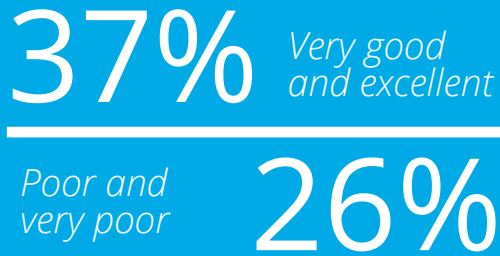
Recruitment, retention, and advancement of women in the automotive industry



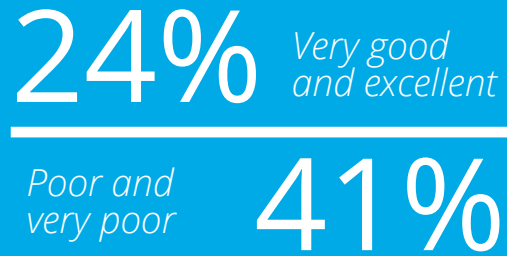
Plenty of opportunity to grow!

Like in the European and North American cases, women of the automotive industry in Turkey think that there is a lot of room for improvement on the issue of women recruitment, retention and development.

How would you rate your company's efforts to recruit women?

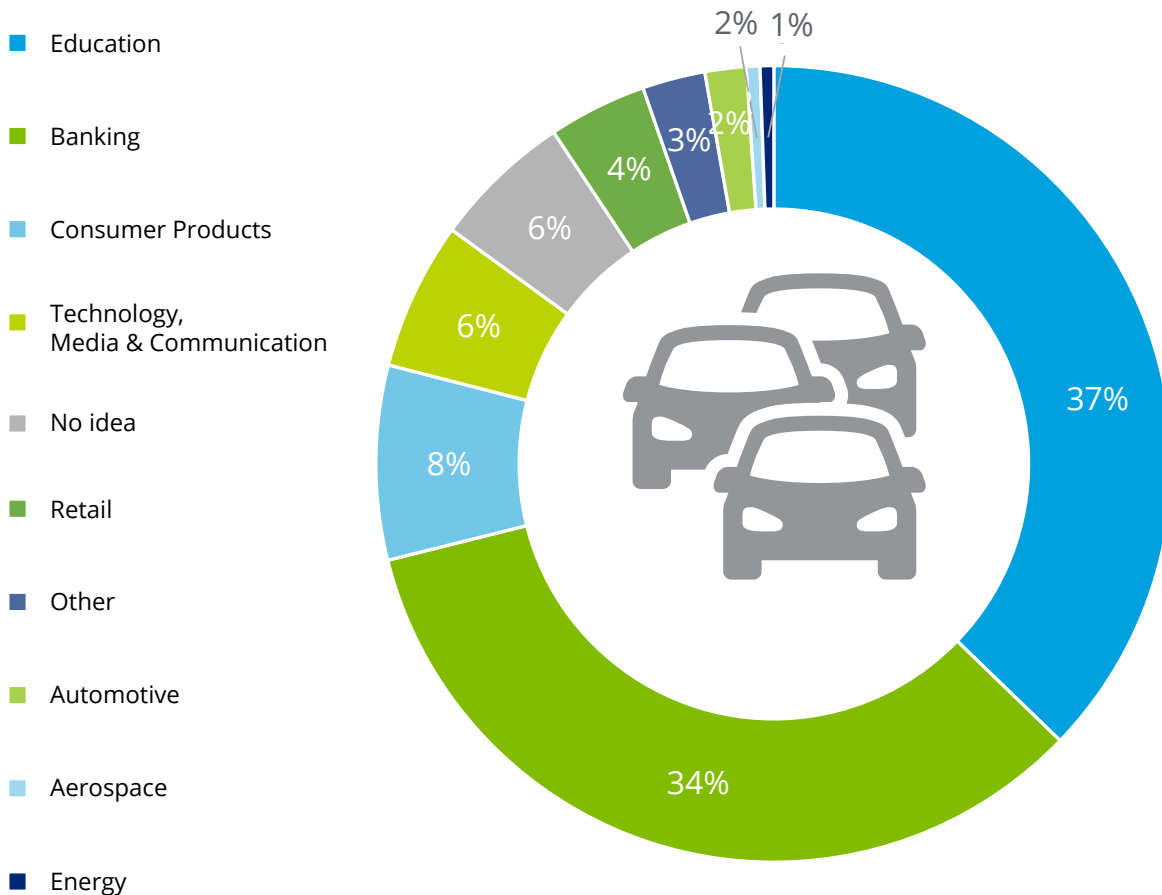


How would you rate your company's efforts to develop women?



Other industries are better at recruiting women

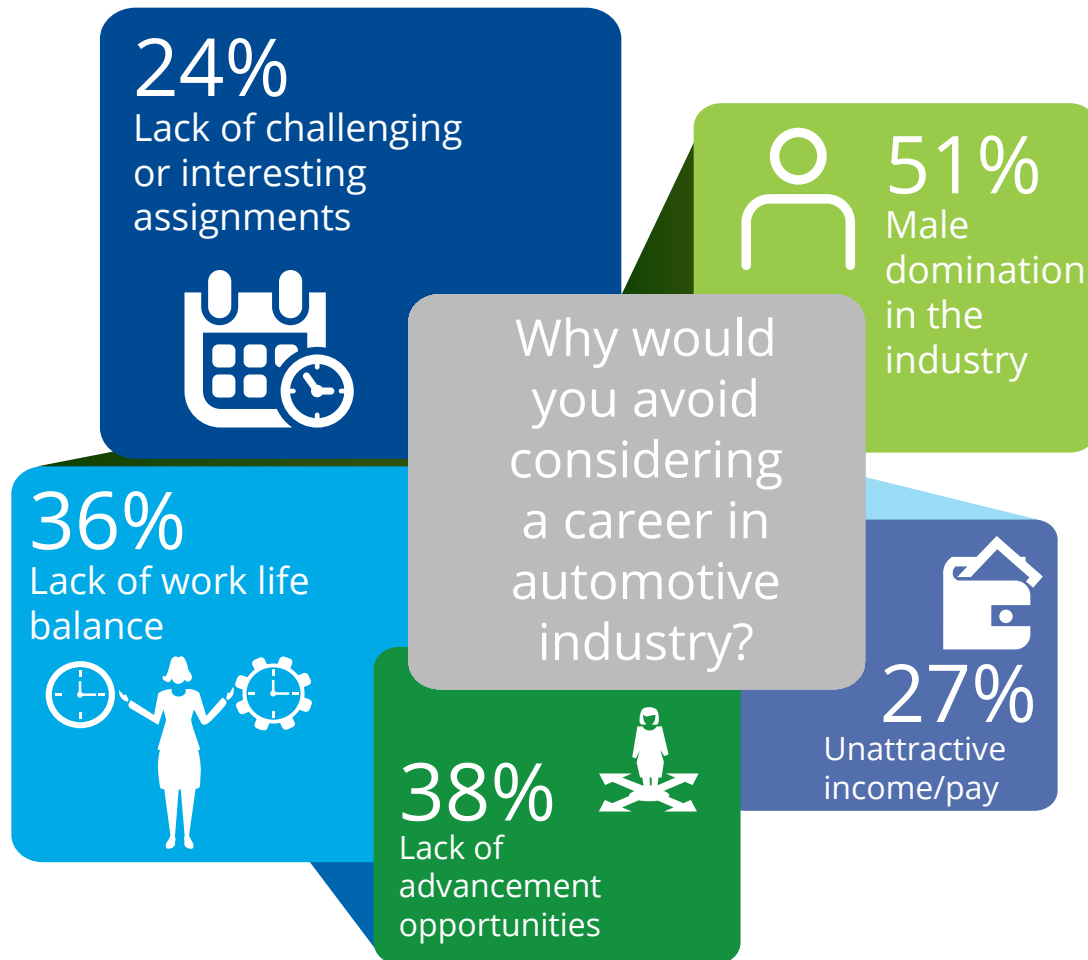
Which industry does the best at attracting and retaining women?



Top reasons women avoid careers in automotive

What would be the top issues that would cause a woman to avoid considering a career in the automotive industry?

There is a strong perception that the automotive industry in Turkey is a male-dominated one. This perception is not as strong in Europe and North America, yet other top reasons why women avoid careers in automotive are similar in all cases.



What motivates women to stay or go?

More than half of the women in Turkish automotive industry are content to be a part of this industry; %57 of them state that they would remain in the automotive industry. This number is %62 and %71 respectively for the European and American cases. Although they have certain expectations and demands, majority of women globally do not regret being a part of the automotive industry.

I would remain in the automotive industry



I would move to a different industry



Top reasons they stay?



Attractive
income/pay



Opportunities for challenging
and interesting assignments

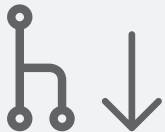


Promotion and
advancement
opportunities



Work life
balance

Top reasons they consider leaving?



Lack of promotion
opportunities



Unattractive
income/pay



Lack of work
life balance



Lack of
advancement
opportunities

Where would they rather go?

If you would move to a different industry, where would you go?

Women in Turkish and North American Automotive industry have similar choices: Technology, Media and Telecommunications (TMT) and Education. Differing from the Turkish case, Consumer products sector is in top three in Europe and North America. Energy sector is the third choice of Turkish women in automotive, and it is also in top 3 with TMT and Consumer products in Europe.

Highest choices



69%
TMT



61%
Education



53%
Energy

Lowest choices



22%
Retail



21%
Finance



13%
Chemicals

What makes an impact?

Top three most impactful programs the respondents recommend to attract and retain women in automotive industry:

Mentorship & Education are the top priorities in Europe and in N. America

Second choice of women participants all around the world

Third Choice in North America, and first in Europe

The recommendations of respondents in Turkey:

1 Defined career progression steps and international career/mobility options

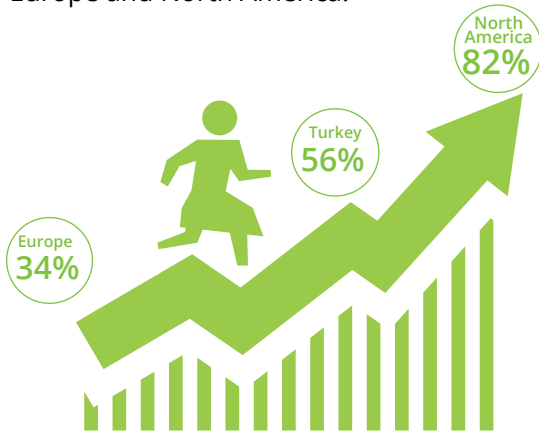
2 Identifying and increasing the visibility of key leaders who serve as role models for employees

3 Flexible work practices

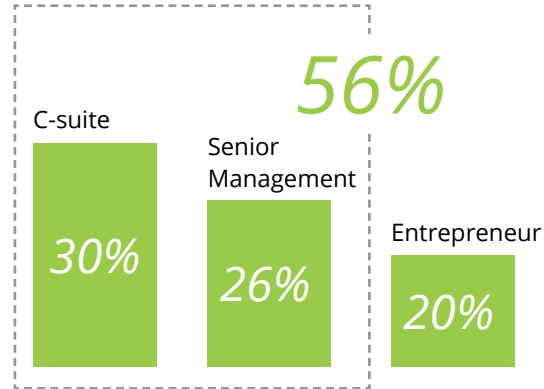
The number of women leaders as role-models should increase. This is one of the clearest messages of women in automotive industry in all geographies the research took place. Flexible working hours is also amongst women's most important recommendations.

Pathways to prosperity...

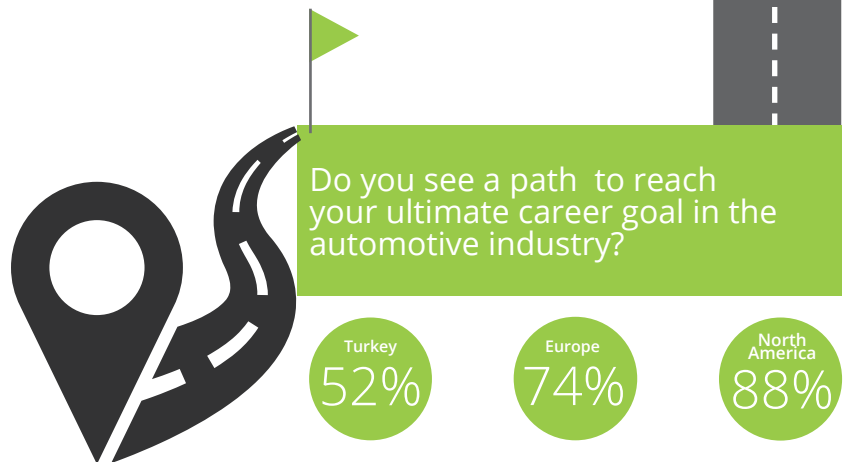
While more than half of the Turkish women participants (56%) aim to have C-level and/or senior managerial roles, this rate is 34% and 82% respectively for Europe and North America.



What is your ultimate goal?

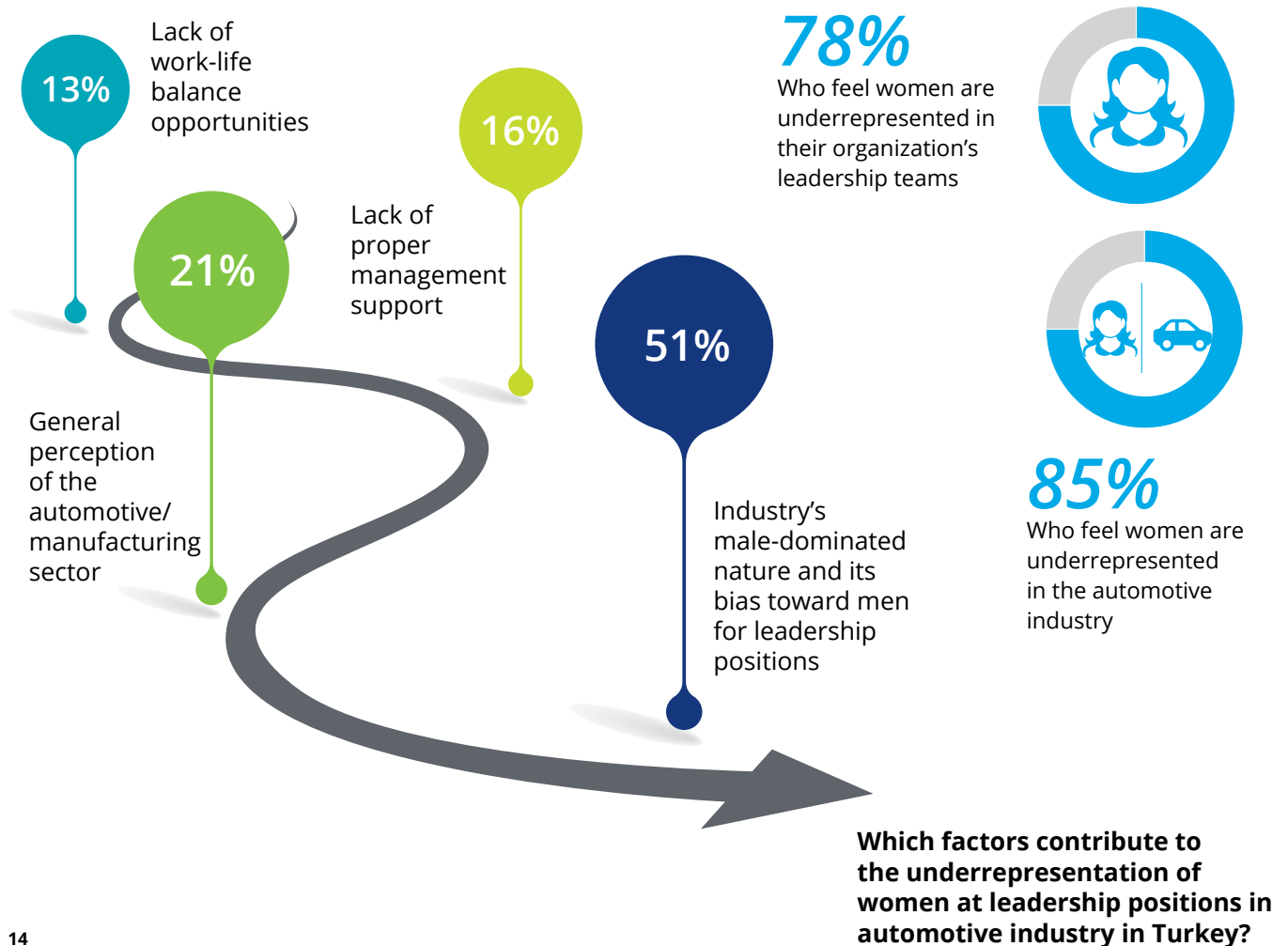


52% of women in Turkey see a path to reach their career goals in automotive industry. This rate is 74% and 88% respectively for Europe and North America. Turkish participants seem to be less optimistic about reaching their career goals in the automotive industry...



Why is the number of women leaders in automotive low?

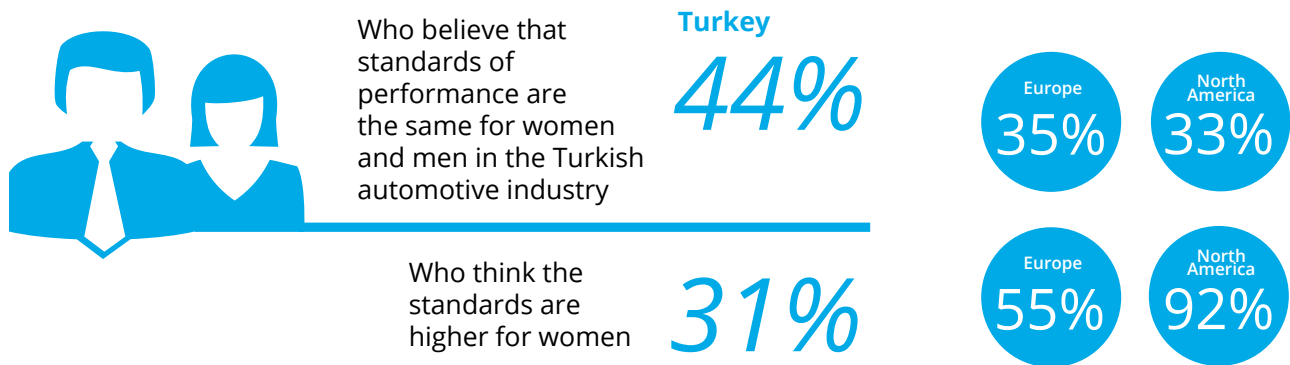
Similar to women participants in Europe and North America, women in Turkish automotive industry think that they are underrepresented in the industry at C-level positions.



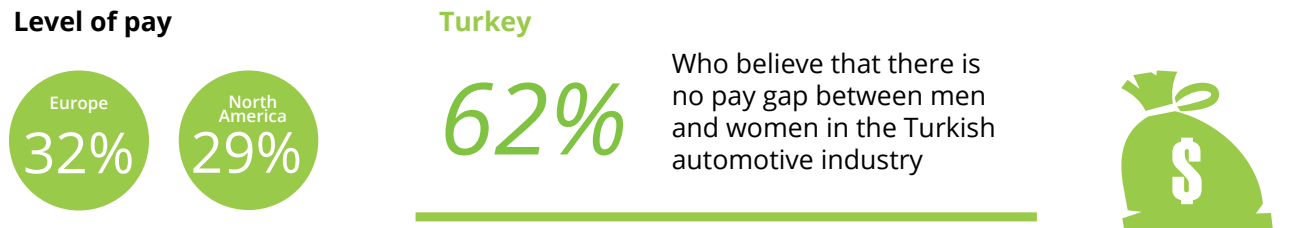
Standards and pay are not unequal

Majority of women in the Turkish automotive industry think that there is a fair play in many respects. Most of them state that on the standards of performance and level of pay issues, they don't observe unjust policies and practices and that women and men doing the same jobs have the same standards of performance and level of pay. This is not the case in Europe and North America: 92% of women participated in the North American study believes standards differ for men and women in the automotive industry and plus 71% of them believe there is a pay gap between men and women (and thus men earn more). 55% of women participated in the European study state that standards of performance are higher for women and 68% of them state that there is a pay gap between men and women (and thus men earn more) in the automotive industry.

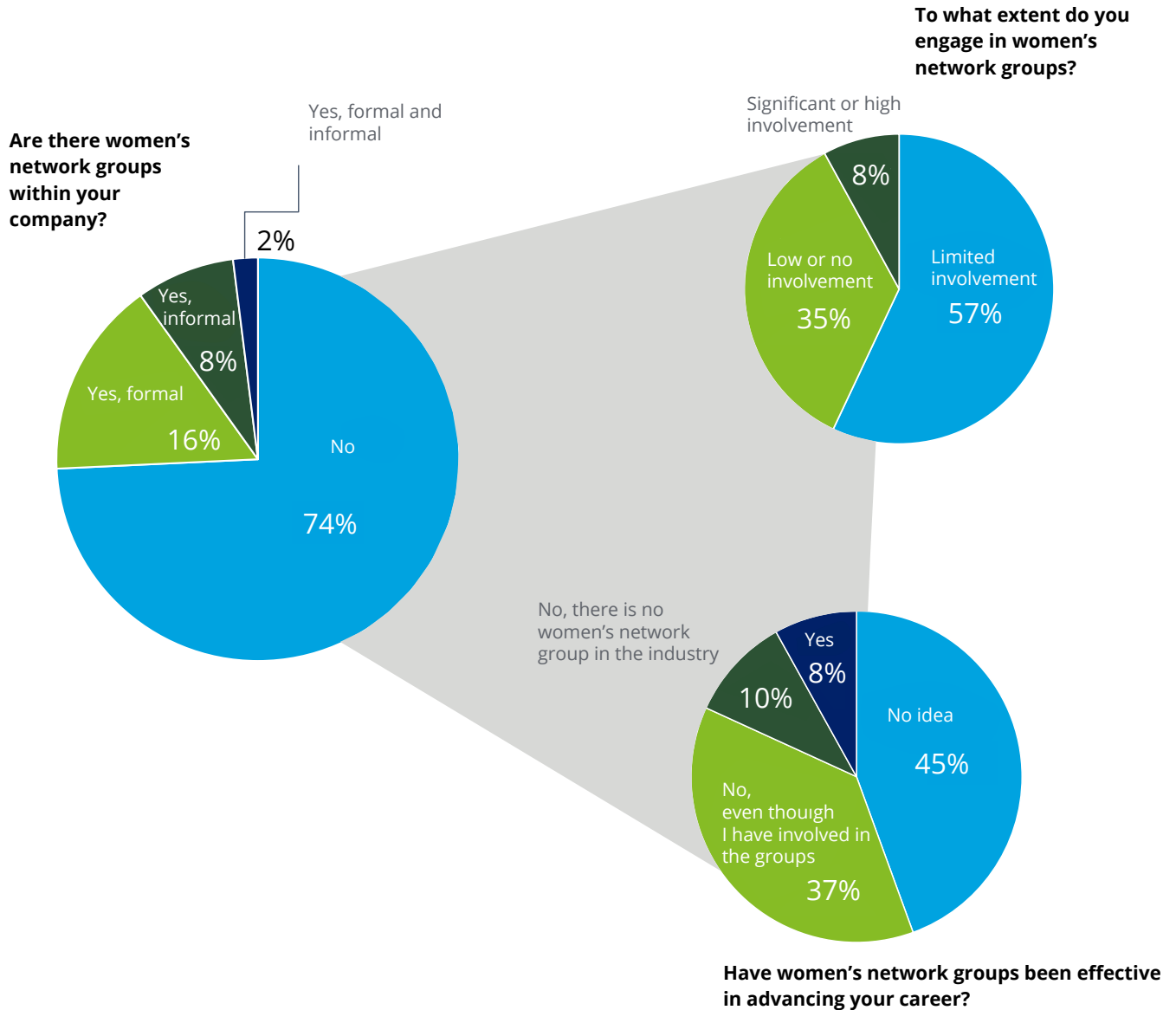
Standards of performance



Level of pay

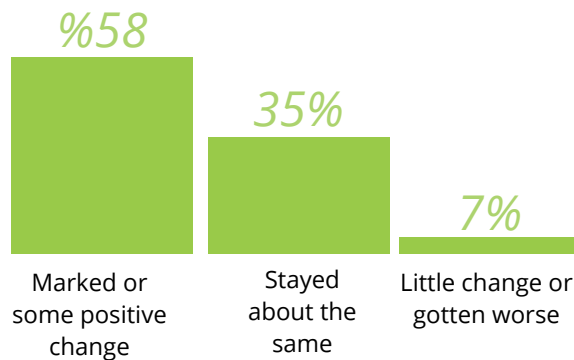


There are not enough and effective women's network groups



It is getting better, but more work is needed

Have you seen positive changes in the automotive industry's attitude toward women over the last five years?



Do you believe schools and universities in Turkey encourage girls to pursue careers in automotive industry?

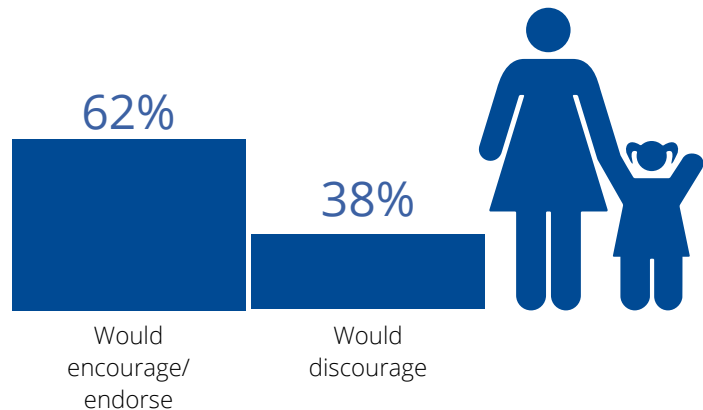
81%

No, the education system does not encourage

6%

Yes, the education system encourages girls to consider automotive industry

Would you encourage your daughter or female family member to pursue a career in automotive?



Messages of Women!



The path forward

What should be on the agenda of the Turkish automotive industry on the issue of recruitment, retention and advancement of women?

1

Start at the top. More women leaders needed

A cultural change begins in C-suite. To erase the perception that automotive industry has a male dominant culture and to have a positive impact on women recruitment and retention in the industry, there must be more and visible women leaders as role-models. Women indicate that “identifying and increasing the visibility of key leaders who serve as role models for employees” is amongst the most impactful programs a company can have to pave the way for attracting and retaining women. This would also incrementally break the glass-ceiling for women.

2

Gender equality is important. Address gender bias head-on

Gender equality should be the norm in the automotive industry. Gender diverse leadership and organizations have crucial positive impacts such as variant perspectives in decision making, balanced corporate management and increase in commercial gains and financial performance.

3

Foster growth and mentorship programs

The women workforce, which is crucial for the automotive industry, should get bigger and stronger through mentorship with the lead of women executives of the industry. In the long run with the increasing number of women leaders, the attractiveness of a career in automotive for women would increase.

4

Create a more flexible work environment

Flexible work practice is one of the top-ranked impactful programs recognized by women in this study. Work-life balance, or the perceived lack of balance in automotive, is one of the factors deterring women from the industry. Thus this perception should be erased through a stronger discourse and a reality of more flexible work environment and practices.

5

Develop the women workforce early

It is crucial to make the automotive industry attractive for young talent, especially young women. This is an important task not only for the automotive industry but also for education system and the government institutions.

6

Promote personal development and training programs

The fact that automotive industry supports life-long learning should be stressed in discourse and in practice. Investment in personal development and training is crucial for the retention and advancement of women in the automotive industry.

7

Stress the technology-focused side of the automotive industry

According to Deloitte research, Technology, Media and Telecommunication sector is not only the top choice of women but also of Y generation. It would be a crucial and an effective step to highlight the technology-focused nature and future of automotive for making the perception towards the industry as attractive as of TMT and solving the 'talent crisis' in the industry.

8

Create a legacy

Women are having such an important mark on the automotive industry today that there is now an opportunity to start a legacy that can long impact the industry and create a strong foundation for tomorrow's leaders. Stressing this mark that makes an impact and the potential of women for future would ensure the stories of success and contribution of women to the automotive industry continue to be told. Success stories and the visibility of women leaders would increase the value that women give to the industry and increase their attachment.

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